Financial Advice Management from Fiserv

Spend more time advising clients and less time in cumbersome systems

Addressing Your Business Priorities

- Support advisor growth
- Accelerate digitization
- Deepen client relationships
- Increase operational efficiency
- Drive revenue and growth

Your Solution – Delivered by Fiserv

With integrated financial planning technology from Fiserv, it’s never been easier for advisors to collaborate with clients to identify financial goals, create investment proposals, open new accounts and deliver financial advice across multiple clients and households. Whether you require a specific solution such as goals-based planning, proposal generation or an end-to-end technology platform, we can integrate your choice and mix of solutions so they perform as one streamlined ecosystem.

Efficient

Scalable

Flexible

Collaborative

Technology Solutions for Wealth Management

Drive growth and efficiency to stay in step with the way people live and work today.

fiserv.

Empower advisors to deepen and grow their book of business with a streamlined financial planning experience

Financial Planning
Utilize a best-in-class suite of goals-based and comprehensive financial planning technology through one streamlined system instead of multiple planning products

Advisor Dashboard
Provide snapshot of advisor's book of business with access to managed product research, proposal generation and workflow integration to optimize client onboarding and servicing

Investment Proposals
Generate well-designed, client-facing proposals quickly and easily with integrated technology that scales across multiple advisors and accounts

Scenario Manager
Create multiple "what-if?" scenarios, allow for contingencies and alternative funding strategies, and illustrate the impact of plan variants and decisions in real time with clients

Configurable Risk Assessment
Provides each organization with the opportunity to create its own risk assessment methodology to help tailor advice and promote specific portfolios

Product Solutions
Demonstrate the need for products such as long-term care insurance, life insurance, fixed and/or variable annuities and simulate how they can improve a client's financial outlook and protect against risk

New Account Opening
Open new accounts quickly and seamlessly with proposal-generation integration, custodian-specific workflow, and vendor-agnostic electronic signature capability

APIs
Leverage all functionality and calculations of our financial planning technology with complete control over the user experience. Deliver a digital experience customized to your own brand and vision on any digital device, website or app

Connect With Us
For more information about financial planning, call 800-872-7882, email getsolutions@fiserv.com or visit us at www.fiserv.com/financialplanning

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